

ARIS action	Examples: (each bullet represents a sample format with the relevant details listed)
<p>New 416/417 projects:</p> <p>X To create a new 416/417</p> <p>X To start a new Project when the existing Project reaches its Term Date</p>	<p>X FY 2007 Permanent Fund Transfer of \$125,000 from 5410-12130-005-00D/406459. Establish new project per instructions from NPS, memo dated xx/xx/xx from Dr. John Doe.</p> <p>X Establish new project to replace 5445-31000-007-00D/411123. FY 2007 Permanent Fund Transfer of \$315,000 from 5445-31000-007-00D. Project approved through NP xxx Peer Review (or Ad Hoc Review) as per OSQR memo dated xx/xx/xx.</p>
<p>Revising the 416/417:</p> <p>X Changes in Title, Objective, Approach, Keywords, and/or 417 Codes (STP, SOI, etc.)</p>	<p>X Modified the Objective & Approach per discussions with NPL's. (Reference an E-mail or memo and the date).</p> <p>X Revised the 417 codes per instructions from NPS, memo dated xx/xx/xx from Dr. John Doe.</p>
<p>Fund Transfer:</p> <p>X Occurs when one ARS project authorizes funds to be transferred to another ARS project (receiving Unit initiates the ARIS transfer).</p> <p>X Forward memos/Emails to the Area Office/Program Analyst for documentation.</p>	<p>X FY 2007 Temporary Fund Transfer of \$53,000 from 5428-66000-004-00D/407567 for the Sclerotinia Initiative. Per Email (or memo) dated xx/xx/xx from Dr. John Doe (name the location).</p> <p>X FY 2007 Temporary Fund Transfer of \$20,000 from 5402-21000-005-00D/408789 to increase cotton and peanut accessions. Per Email (or memo) dated xx/xx/xx from Dr. John Doe (name the location).</p> <p>NOTE: Block the entry/info in the Remarks section on the 416 Project Info tab and do a Ctrl C (copy). Go to the Fund Transfer tab and complete the fund transfer data entry and then click on the Comments button and place your cursor within the Comments field and do a Ctrl V (paste). The Comments field on the Fund Transfer tab is required and the same info used in the 416 Project Info Remarks block can be entered here. The main information should always be the action related to funding and everything else should follow. Only the first three lines appear for use by the HQ Budget and Program Management Staff (BPMS).</p>
<p>Bridging projects:</p> <p>X Upon instruction from the Area Office Program Analyst and/or Headquarters staff</p> <p>X ARIS Staff should monitor the Term Dates on all projects, but especially the D projects and process a Bridging project well before the Term Date on the expiring D project to allow for processing of the fund transfer and project accountability actions.</p>	<p>X FY 2007 Permanent Fund Transfer of \$xxx,xxx from 5430-43440-005-00D/411001. 5430-43440-xxx-00D has completed the OSQR Peer Review process for NP xxx Ad Hoc Review. Extended the termination date to 08/31/09; updated Title, Objective, and Approach. Modifications made per E-mail dated xx/xx/xx from Dr. John Doe (name of the NPL initiating the instructions).</p> <p>X FY 2007 Permanent Fund Transfer of \$xxx,xxx from 5450-51000-020-00D/404123. Bridging project to replace 5450-51000-020-00D/404123, which will go through NP xxx Ad Hoc or Peer Review in June xxxx.</p>

Specific Cooperative Agreements: outgoing funds only	
X Establish a new SCA:	X New SCA with FY 2007 funds in the amount of \$150,000. X New SCA with FY 2007 funds in the amount of \$300,000 for the XXX Initiative.
X Adding funds to an existing Specific Cooperative Agreement:	X Add FY-07 funds in the amount of \$50,000; Request Type = Add Funds. X Add FY-08 soft incoming funds of \$85,000; Request Type = Add Funds.
X Extending the time: <i>Always include the old date + new date.</i>	X Extension of time only for a period of one year from xx/xx/xx to xx/xx/xxxx for project continuation; Request Type = Time Only.
X Add funds & extend time <i>Always include the old date + new date.</i>	X Add FY-07 funds in the amount of \$50,000 and extend the period of agreement from xx/xx/xx to xx/xx/xxxx; Request Type = Extend Time with Added Funds.
Reimbursable & Trust Fund 416/417:	
X Funding increase	X Increase funding in the amount of \$75,000 for FY-07; adding 416/417 to Log #xxxxx; entered the AIMS documents.
X Time extension	X Extend the period of agreement from xx/xx/xxxx to xx/xx/xxxx.
X Funding increase/time extension <i>Always include the old date + new date.</i> Copy/paste the Remarks from the 416 into the Comments block on the Incoming Agreement.	X Increase funding in the amount of \$75,000 for FY-07; Extend the period of agreement from xx/xx/xxxx to xx/xx/xxxx.
Post-Doc Fund Transfer Request: X First request for funds. X Candidate must report for duty prior to funds being requested. <i>Minority status is no longer mentioned.</i>	X Request \$50,000 Temporary FY 20xx Fund Transfer from 0101-88888-016-00D for Headquarters Funded post-doc position. Mentee: Dr. Mary Brownson; Mentor: Dr. Steven Jones; EOD: xx/xx/xxxx; Class of xxxx; Balance: \$40,000. Note: always use 0101-88888-016-00D for post-doc funds from HQ
Post-Doc Fund Transfer Request: X Request for remaining funds.	X Request \$50,000 Temporary FY 20xx Fund Transfer from 0101-88888-016-00D for Headquarters Funded post-doc position. Mentee: Dr. Mary Brownson; Mentor: Dr. Steven Jones; EOD: xx/xx/xxxx; Class of xxxx; Balance: \$0.
Program Increase: Must include: X Fiscal Year of funds received X \$\$ amount of program increase X Purpose of program increase (is this for recruitment of an SY or for SCA's, etc.) X PDRAM #, PDRAM Date, & name of the NPL(s) issuing the program increase X If an SY position is being added Giving project number	X PDRAM #xx dated 02/08/2007 from S. Kappes/E. Byington. FY-07 funds in the amount of \$50,000 from 0101-88888-028-00D. X PDRAM #xx dated 02/08/2007 from J. St. John/E. Byington. FY-07 funds in the amount of \$202,000 from 0101-88888-028-00D. Modified the Objective, Approach, keywords, and added one Cat. 1 vacancy, Soil Scientist.
Revising the SY list: • Delete Position	• Deleted Vacant position from the Investigator list (1T2613/Vice Lynn James; 25% SY time). Position abolished per approval from M. Walbridge dated 04/02/2008. Vacant Investigator abolished from 5428-32630-011-00D/412849; 5428-31320-005-00D/412852; and 5428-32000-015-00D/412851 at 25% on each for 1T2613/Vice James. (abc, 04/10/2008).
• Revising SY Time	X Revising SY time as follows: Added Scott Bean at 20% (80% on 5430-44000-017-00D); changed Michael Tilley from 80% to 50%

<p>Include Initials/Name & Date of Person Making Entry</p> <p>Accession Number is Helpful.</p>	<p>(50% on 5430-44000-017-00D); changed Jeff Wilson from 70% to 50% (50% on 5430-44000-017-00D. Vacant position (1T3247) remains at 100%. (def, 1/18/08).</p> <p>NOTE: Please follow the format suggested above because it helps with the Audit Trail component that is in ARIS, and enables staff reviewing the SY time alignment to provide accurate information to the Area Directors on follow-up reports. It also helps to ensure the SY % aligns across all applicable D projects assigned to the Unit so that each SY listed totals to 1.0 (100%).</p>
<p>Vacant Position(s):</p> <p>X Revising the 416/417 to reflect a vacant position (due to an SY leaving or adding an SY per instructions from HQ):</p>	<p>X Add Vacant position for a Rangeland Ecologist at 1.0.</p> <p>X Revise position held by Mary Smith to Vacant due to her transfer to the National Program Staff.</p> <p>X Deleting Agronomist position due to retirement. Position will be retained, but changed to Plant Physiologist at 1.0.</p>
<p>Abolish Position(s):</p> <p>X Revising the 416/417 to reflect an abolished position (due to an SY leaving or a Vacant position that will not be filled):</p>	<p>X Use the Remarks to document the information about the abolished position. Include the SF-52 number and date, which position is being abolished (<i>example</i>, 1T12345/Agronomist).</p> <p>X Remarks example: Deleted Vacant position from the Investigator list (1T2613/Vice Lynn James; 25% SY time). Position abolished per approval from M. Walbridge dated 04/02/2008. Vacant Investigator abolished from 5428-32000-014-00D/412850; 5428-31320-005-00D/412852; and 5428-32000-015-00D/412851 at 25% on each for 1T2613/Vice James. (marcie, 04/10/2008).</p>
<p>Project renumbering:</p> <p>X The renumbering is done on the 416 only, and then it migrates to the AIMS part.</p> <p>NOTE: Please include initials or name and date of action because it helps when following an audit trail, or when there are multiple renumbering actions due to Bridging projects and subsequent new projects.</p>	<p>X Correction action: Renumbering from 5442-xxxxxx-xxx-xxS to 5442-xxxxxx-xxx-xxS; Request Type = Other. (Request Type entry applies only to G, N, or S projects; copy/paste 416 Remarks entry into the Comments block on the Incoming Agreement).</p>

Any other circumstances, issues, needs: Please call, Remarks examples can be provided per HQ's desired format.